From:	Gehman, Shaun (Salt Lake City) <Shaun.Gehman@fiserv.com>
Sent:	Thursday, May 16, 2019 2:44 PM
To:	Joy Peterson
Subject:	RE: Bessemer System FCU
Attachments:	Data DeConversion Proposal - Bessemer System FCU.pdf

Joy,

The quote was never delivered as you did not respond to the inquiries about how you to proceed. The quote for deconverting eFichency is attached.

Thanks,
Shaun

From: Joy Peterson <jpeterson@bessfcu.com>
Sent: Thursday, May 16, 2019 12:04 PM
To: Gehman, Shaun (Salt Lake City) <Shaun.Gehman@fiserv.com>
Subject: FW: Bessemer System FCU

⚠ EXTERNAL MESSAGE – Think Before You Click

Shaun-
I just realized that no quote for the extraction of this information was ever quoted to me. Would you please provide that information also?

Joy E. Peterson, CEO
Bessemer System FCU
106 Woodfield Drive
Greenville, PA 16125
(724) 588-6119 Ext. 1221
jpeterson@bessfcu.com
NMLS# 747263

From: Joy Peterson [mailto:jpeterson@bessfcu.com]
Sent: Thursday, May 16, 2019 2:01 PM
To: 'Gehman, Shaun (Salt Lake City)'
Subject: RE: Bessemer System FCU

Shaun-
Your e-mail in November indicated that the information would be an easily accessible "folder structure by repository and date". Now you are seemingly indicating the reports will be on paper and shipped 2-3 months after conversion? Why would it take 2-3 months to provide the information to us, especially since your e-mail indicates the information will have been purged within 30 days. I'm also quite concerned that you are indicating that our data will be purged in 30 days. I feel certain that Fiserv has been instructed to maintain all records related to our current complaint without exception. Any purging of our data will most certainly be met with additional legal action.

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Joy E. Peterson, CEO
Bessemer System FCU
106 Woodfield Drive
Greenville, PA 16125
(724) 588-6119 Ext. 1221
jpeterson@bessfcu.com
NMLS# 747263

From: Gehman, Shaun (Salt Lake City) [mailto:Shaun.Gehman@fiserv.com]
Sent: Thursday, May 16, 2019 11:30 AM
To: Joy Peterson
Cc: timothy@css4cu.com
Subject: RE: Bessemer System FCU

Joy,

I wanted to follow up on our email exchange from November regarding eFichency.

As your hosted documented repository provider we need to know if you intend to deconvert this data and have it extracted for your use. Without this data you will have no way to access any reports or statements from the past once you deconvert. The data archival will be available for 30 days and then purged. This archived data will not be accessible after that point.

EFichency deconversion data is typically ready to be shipped 9-12 weeks after the deconversion date. This is an optional service and is quoted based upon the size of your archive.

Will you be requiring a deconversion from eFichency?

Thanks,
Shaun

From: Gehman, Shaun (Salt Lake City)
Sent: Thursday, November 15, 2018 11:29 AM
To: 'Joy Peterson' <jpeterson@bessfcu.com>
Cc: timothy@css4cu.com
Subject: RE: Bessemer System FCU

Miss Peterson,

Thank you for the response.

We will exclude online banking details. This will require all members to re-enroll and setup items such as automatic transfers, preferences, etc. I'll gather the timelines for shutting down bill pay. We will need to know who your new provider is and the timing of when it will turn up.   Since your bill pay utilizes a good funds model payments can only be made while on the platform. As part of your deconversion fees you'll have access to Interact Web which will allow you to have access to member bill pay information.

e-Fichency data dumps occur after deconversion to ensure we have captured all of the documents loaded in your repository. Pricing is determine based upon the amount of data that is stored and which repositories you'd like to receive. The data itself would be loaded into a folder structure by repository and date so you'd be able to find

documents without importing into another document management system. If you'd like to extract these documents we can quote the extraction.

Thanks,
Shaun

From: Joy Peterson <jpeterson@bessfcu.com>
Sent: Thursday, November 15, 2018 10:00 AM
To: Gehman, Shaun (Salt Lake City) <Shaun.Gehman@fiserv.com>
Cc: timothy@css4cu.com
Subject: FW: Bessemer System FCU

Mr. Gehman,
These questions were forwarded to me by Compusource in regard to our upcoming data conversion. We will not be needing data files from our current online banking platform. We won't need data files from the bill pay platform assuming there is an established method to monitor and manage any payments that are outstanding or still in process at the time of conversion.

I do need more information regarding the question about a data dump from our document management system. Does this question refer to E-Fichency? If so, what time frame is involved in a data dump such as this? Is the data then readily accessible or will special software be required to view it?

Joy E. Peterson, CEO
Bessemer System FCU
106 Woodfield Drive
Greenville, PA 16125
(724) 588-6119 Ext. 1221
jpeterson@bessfcu.com
NMLS# 747263

From: Chris Nestico [mailto:cnestico@css4cu.com]
Sent: Thursday, November 15, 2018 10:41 AM
To: jpeterson@bessfcu.com
Subject: FW: Bessemer System FCU

Hi Joy:
Tim will be calling you in a little bit on this.

From: Gehman, Shaun (Salt Lake City) [mailto:Shaun.Gehman@fiserv.com]
Sent: Wednesday, November 14, 2018 5:30 PM
To: Chris Nestico
Cc: bbuzak@css4cu.com; gstoll@css4cu.com; timothy@css4cu.com
Subject: RE: Bessemer System FCU

Chris,

Can you provide some guidance on the following areas:

- Online Banking deconversion
  - Will the CU require any data files from their current online banking platform?
- Bill Pay deconversion
  - Will the CU require any data files from their current bill pay platform?

- Document archival
  - Will the CU require a data dump from their current document management system?

Thank you,
Shaun

From: Chris Nestico <cnestico@css4cu.com>
Sent: Thursday, November 01, 2018 1:48 PM
To: Gehman, Shaun (Salt Lake City) <Shaun.Gehman@fiserv.com>
Cc: bbuzak@css4cu.com; gstoll@css4cu.com; timothy@css4cu.com
Subject: RE: Bessemer System FCU

We only require one test cut.

From: Gehman, Shaun (Salt Lake City) [mailto:Shaun.Gehman@fiserv.com]
Sent: Thursday, November 01, 2018 3:34 PM
To: Chris Nestico
Cc: bbuzak@css4cu.com; gstoll@css4cu.com; timothy@css4cu.com
Subject: RE: Bessemer System FCU

Chris,

Will you only require 1 test data cut or will you need more?

Thanks,
Shaun

From: Chris Nestico <cnestico@css4cu.com>
Sent: Thursday, November 01, 2018 1:15 PM
To: Gehman, Shaun (Salt Lake City) <Shaun.Gehman@fiserv.com>
Cc: bbuzak@css4cu.com; gstoll@css4cu.com; timothy@css4cu.com
Subject: RE: Bessemer System FCU

Shaun:
Preliminarily speaking we are looking at May 31, 2019 as the conversion date.
We would like the test data to be as of 11/30/2018 (completion of the business day).
Final Data would be as of the completion of work on 5/31/19.
We have a secure dropbox feature on our website and Tim Pruitt can supply you those credentials when needed.

Please let us know how these dates work for you and if they present any problems.

Thank you.
Chris

From: Gehman, Shaun (Salt Lake City) [mailto:Shaun.Gehman@fiserv.com]
Sent: Thursday, November 01, 2018 1:29 PM
To: Chris Nestico
Cc: bbuzak@css4cu.com; gstoll@css4cu.com; timothy@css4cu.com
Subject: RE: Bessemer System FCU

Chris,

Thanks for the email. Bessemer System FCU has requested deconversion files from Fiserv. Can you please provide the following:

- Data of conversion to CompuSource
- Date files are required (test and final)
- Transmission details of where to send the files

Thank you,

Shaun

Shaun Gehman
Professional Services Executive
Credit Union Solutions
Office: 801-902-8624 | Mobile: 801-319-8387

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From: Chris Nestico <cnestico@css4cu.com>
Sent: Thursday, November 01, 2018 10:55 AM
To: Gehman, Shaun (Salt Lake City) <Shaun.Gehman@fiserv.com>
Cc: bbuzak@css4cu.com; gstoll@css4cu.com; timothy@css4cu.com
Subject: Bessemer System FCU

Hello Shaun.
It is my understanding that you have been trying to reach out to Tim Pruitt. Unfortunately, Tim has been sick for most of the week and has been away from all email and phone messages.

Though Tim is the conversion developer/specialist and in most cases the resource that you should be in contact with, it would probably be advisable to reach out by email and include all of the following address until Tim is well again. I did reach out to him earlier and based on how he sounded he will more than likely not back until Monday.

Myself, Chris Nestico (Head of Support): chrisn@css4cu.com
Brian Buzak, Sales: bbuzak@css4cu.com
George Stoll (Head of Programming): gstoll@css4cu.com
Tim Pruitt: timothy@css4cu.com

You can also reach out to us by phone from 8:00 – 5:00 at 800-295-9100.

I apologize for the confusion.

Best Regards,
Chris Nestico

fiserv.

Budgetary Proposal
Bessemer System Federal Credit Union

Contact kenyautta.lamb@fiserv.com
(469) 287-3614

eFichency Data Deconversion

Description	Detail	Hours	Hourly Rate	Total	
Standard Data Extraction Fees:					
Document Pricing:	GB			$	-
Report (COLD) Pricing: This includes Statements and Notices	Flat Rate Pricing Unlimited Amount			$	5,000 00
			Grand Total	$	**5,000.00**

Detail Section

Description
This estimate is based on Standard eFichency Deconversion pricing
Report (COLD) Pricing: This includes Statements and Notices.

Shipping Section

Please update upon proposal approval and attach to deconversion extraction case. **The data extraction will not be started without this information.**

Recipient email: _____

Recipient address: _____

_____

_____

_____

Customer Signature: _____   Date: _____